

PROCEDURE 1310.36
Issued: February 16, 2001
Effective Date: February 27, 2001

SUBJECT: Customer Service Center / Customer Relationship Management Tool Standard

APPLICATION: Executive Branch Departments and Sub-units

PURPOSE: To establish a common suite of customer relationship management tools for the State of Michigan.

CONTACT AGENCY: Department of Information Technology (DIT)
Office of Strategic Policy

TELEPHONE: 517/373-7326

FAX: 517/335-2355

SUMMARY: This procedure establishes the Siebel CRM product suite as the tool for customer relationship management initiatives at the enterprise and agency levels. The modular package allows for individual agencies to implement CRM at scales applicable to their operating unit (OU), while providing a common platform.

APPLICABLE FORMS: None

PROCEDURES:

General Information: The objective of this standard is to facilitate the functions as specified in Procedure 1310.26. That functionality was mapped to major areas identified as:

1. Channels: *input*
2. Knowledge Management: *customer contact data*
3. Decision Making and Reporting: *interaction guidance and reports*
4. Call Center: *escalation process*
5. Enterprise Application Integration: *connection to the backend and case data*
6. Customer Relationship Management: *software that integrates the functional areas*

The functional areas that are met by the Siebel tools include all of these pieces except for *Enterprise Application Integration* and certain *Call Center* components including the computer telephony integration (CTI), call monitoring, and automatic call distribution (ACD) tools. Any exceptions must be interoperable with the Siebel CRM product suite.

Operating Unit(OU): OUs are required to use the Siebel CRM product suite for all future CRM or call center implementations.

Enterprise: Any enterprise level customer service implementations will utilize the Siebel CRM product suite.

Maintenance:

DMB: Acquisition Services shall not approve any acquisition or purchase request without confirmation from the Department of Information Technology, Office of Research and Policy that such request is in compliance with the standard.

Operating Unit (OU): Any and all projects, consulting requests, equipment and software acquisition requests, or ITB's relating to Customer Relationship Management (CRM) or call centers will be subject to review for compliance with this standard.

DIT: The Office of Strategic Planning will review this standard on a continuing basis and make recommendations for changes. An appropriate group of staff, representing a wide-range of State Operating Units, will review and possibly revise these standards and guidelines as often as needed.

Exceptions from this standard for reasons other than those outlined above will be made through the exception handling process described in the Exception Process Template.
